



**President's Management Agenda
Department of Energy**

Initiative		Current Status (As of March 31, 2004)	Progress in Implementing the President's Management Agenda		Comments
Competitive Sourcing Agency Lead: Jim Campbell Lead RMO Examiner: Cyndi Vallina Lead OFPP Analyst: Mathew Blum	 Green Next ↑ est. by <u>Q3</u> <u>2004</u>	<ul style="list-style-type: none"> • Approved competition plan <u>X</u> "yellow" plan on <u>Q2 2002</u> <u>X</u> "green" plan on <u>Q2 2004</u> • Standard competitions <u>X</u> completed one on <u>Q4 2003</u> OR announced one that exceeds FTEs in "yellow" plan on <u>Q3 2004</u> <u>X</u> announced in accordance with "green" plan schedule <u>Q2 2004</u> <u>X</u> in the past year completed = 90% in 12 months or less <u>Q2 2004</u>. • Standard and streamlined competitions <u>X</u> at least 3 completed since January 2001* *Modified per agreement between OMB and DOE. • Streamlined competitions completed in 90 days or less <u>X</u> = 75% during the past 2 quarters <u>3Q 2003</u> <u>X</u> = 95% during the past year on <u>3Q 2003</u> • ≤ 10% of announced standard and streamlined competitions cancelled <u>X</u> in past two quarters <u>4Q 2003</u>. <u>X</u> in past year <u>4Q 2003</u> • Commercial activities exempt from competition __ OMB approved all categories for justification on __ (date) __ 	 Green <u>Actions Taken Since December 31, 2003</u> <ul style="list-style-type: none"> • Announced decision on Financial Services study. • Submitted green plan to OMB for approval. • Released PWS on HR-training and logistics studies. • Completed Phase 1 of FY 2004 feasibility review and obtained ESG approval for Phase 2, held union discussions and released DOE announcement. • Conducted semi-annual town hall meetings on A-76 progress. • OMB approved six-month extension for IT study. • Submitted revised competitive sourcing reports for Congress. • Complied with OMB CS data call. <u>Planned Actions for Q3 FY 2004</u> <ul style="list-style-type: none"> • Announce decision on NNSA Logistics streamlined study. • Complete Phase 2 of feasibility review and obtain ESG approval for Phase 3 – FY 2004 studies. • Release solicitations on HR-training and DOE Logistics studies. • Release final PWS for IT study (estimated value of work is \$1.5 billion). • Conduct additional town hall meetings in field. • Conduct pilot on use of schedules as approved by OMB. 		<ul style="list-style-type: none"> • DOE moved to "green" status with OMB's approval of its green competitive sourcing plan. The plan includes studying all B-coded activities (excluding the Power Marketing Administrations). • Consistent with GAO's recommendation, DOE is using an enterprise-wide approach and is the first agency to complete a study and use the best value trade-off process under the revised Circular. • DOE is studying 1,878 positions and plans to study 2,346 positions. • DOE intends to announce 600-800 FTEs for study in FY 2004; 200-400 FTEs in FY 2005; and 166-366 FTEs in FY 2006. • OMB is reviewing DOE's request to pilot the use of Federal Supply Schedules in standard competition. Approval would include asking DOE to compare pilot results against a comparable sized full & open competition. Pilot would compare time savings, cost savings, offers, and protests against competition. • DOE will stay "green" if it continues to meet the performance objectives of its approved plan, conducts an independent review of at least one completed study, identifies plans for savings, and continues to reevaluate its FAIR Act inventory annually.

March 31, 2004

**President's Management Agenda
Department of Energy**

Instructions for Scorecard Presentation

Accountability/Contact Information

List the name and title of the agency's lead for the initiative. Also, list the names of the OMB Resource Management Office (RMO) examiner and the OPM or OMB statutory office lead staff for the initiative.

Current Status Column

Indicate the status rating (green, yellow, or red) for the quarter based on which of the Standards for Success have been achieved. (See <http://www.results.gov/agenda/standards.pdf> for listing of standards for five government-wide initiatives.)

If the status rating changed from the previous quarter, the rating should be followed by an up or down arrow, as appropriate. If the rating improved from red to green or deteriorated from green to red, two arrows should be used. Indicate the estimated date (quarter and year) of the next status improvement. If the agency has already achieved green status for the initiative, the note can be deleted.

Example: Next ↑
 est. by
 FY 2004
 Q3

The current status column has been standardized to present a check list for the Standards for Success. This presentation will make it clear which of the green and yellow standards have been achieved for each of the initiatives. Although short hand descriptions have been used to identify the standards in the quarterly scorecards, an agency must meet all the specifications identified in the Standards for Success. The checklist is presented in the order of the green standards and sub-bullets generally correspond to the yellow and green levels for the standard. (Because in Improving Financial Performance, there is greater potential for an agency to move from red to green for a particular standard, the red conditions are listed for the audit opinion and material weakness standards.) A space is provided before each of the sub-bullets where one should indicate (with a check or X) if the standard has been achieved. Following each sub-bullet there is a space to enter the date that the standard was achieved or is expected to be achieved. The date can be presented as the month or quarter and the year. It is understood that future dates are approximate and that estimates may change each quarter. In cases where a standard was achieved long ago, there is not need to determine the precise date; either an estimate or a less than symbol (<) with the word date can be included in the space.

March 31, 2004

**President's Management Agenda
Department of Energy**

Example:

- No chronic or significant Anti-Deficiency Act Violations
3 as of < date




- Material auditor-reported internal control weaknesses as of Feb 2002
3 repeat
___ new
___ none

Use bold to highlight any standard that was achieved in the past quarter or is posing particular difficulty. For instance, if an agency does not have plans to achieve a standard or has not taken meaningful action to achieve it, you may wish to bold the standard and put question marks in the space for the date.

Progress Column

Indicate the progress rating (green, yellow, or red) for the quarter based on the definitions listed below:

Definitions of Progress Evaluation

- | | | |
|---------|---|---|
| Green: |  | Implementation is proceeding according to plans agreed upon with the agencies. |
| Yellow: |  | Slippage in implementation schedule, quality of deliverables, or other issues requiring adjustments by agency in order to achieve initiative on a timely basis. |
| Red: |  | Initiative in serious jeopardy. Unlikely to realize objectives without significant management intervention |

If the progress rating changed from the previous quarter, the rating should be followed by an up or down arrow, as appropriate. If the rating improved from red to green or deteriorated from green to red, two arrows should be used.

Key actions completed in the past quarter and key actions planned for the following quarter should be listed. This list need not be comprehensive, as agencies may have additional steps they are taking to implement the President's Management Agenda. Significant actions, either completed or planned, should be indicated in bold typeface.

March 31, 2004

**President's Management Agenda
Department of Energy**

Comments Column

The comments column should provide additional information as necessary to enhance the presentation. For instance, an assessment of an agency's overall progress relative to its Proud to Be goals should be provided. Other information to be included, as appropriate, includes:

- Identification of any critical actions planned after the next quarter;
- Discussion of any assistance that OPM and/or OMB may need to provide the agency in the next few quarters to assist with a pending status improvement; and
- Discussion of other relevant issues such as legislative barriers or other risks to implementing the PMA, current appropriations status of funding proposals relating to implementation of the PMA, changes in agency management of PMA initiatives, etc.

Overall

The quarterly scorecards should not exceed one page per initiative.